



CITY OF OAKLAND
OFFICE OF THE CITY ADMINISTRATOR
SPECIAL ACTIVITY PERMITS
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Exhibit B
ENERGY STAR Portfolio Manager Guide
(for Indoor Cultivators only)

Background

Benchmarking is the process of tracking a building’s energy, water, and waste consumption, so you know how the building’s efficiency performance compares to similar properties over time. Benchmarking is completed in a tool created by the Environmental Protection Agency, called the EPA ENERGY STAR Portfolio Manager. This process requires you to input the physical characteristics of your building and its energy systems, as well as your energy use, and offers a variety of forms and outputs that help understand how efficiently the building uses energy.

How to complete an Annual Energy Benchmark Summary

Please follow the five steps outlined below and return your Statement of Energy Performance (SEP) and Emissions Performance Reports to the City Administrator’s Office as attachments to your Medical Cannabis Permit Application.

- Step 1: Create a building profile in ENERGY STAR Portfolio Manager
- Step 2: Get energy data automatically (Recommended)
- Step 3: Generate a Statement of Energy Performance
- Step 4: Confirm your data is complete and accurate
- Step 5: Send data to City of Oakland

Step 1: Create a building profile in Portfolio Manager

Register an account in [ENERGY STAR Portfolio Manager](https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager) (<https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager>), then log in and create a profile for your building. You must describe the all spaces in the building, include all energy meters (common and tenant) and any energy generated on-site.

Under Property Use Details, select **Refrigerated Warehouse** on the dropdown menu when answering: ‘What is the primary function of your property?’ Portfolio Manager does not have a use specific to marijuana cultivation, but the consistent use of all applicants of this building type will allow the City to more accurately compare the energy performance of buildings under this process.

If your property has multiple uses (for instance, a retail store in the front and a cultivation space in the back), identify the exact square footage and purpose for both spaces in the Building Use table located under the Details tab.

If you are the only tenant in a commercial or industrial building, you will be able to complete the benchmarking for your whole building. If you are one of multiple tenants, you will be able to list your site as “part of a building” while setting up your account in the Property Use Details section. The only condition which would not allow you to complete the Portfolio Manager process would be either if you are a tenant with a lease in which you are not responsible for electricity bills or you do not have a dedicated electric meter(s) for your business. If this is the case with your facility, please provide a signed statement to this effect. Tenants meeting either of these conditions are exempt from compliance with the reporting requirements of this application.

A great resource for completing Steps 1 & 2 is PG&E's [How to Benchmark Your Building \(http://www.pge.com/includes/docs/pdfs/mybusiness/energysavingsrebates/analyzer/benchmarking/ABS_HowToGuide.pdf\)](http://www.pge.com/includes/docs/pdfs/mybusiness/energysavingsrebates/analyzer/benchmarking/ABS_HowToGuide.pdf). Additional resources available to help you understand this process can be found at the conclusion of this Exhibit.

Step 2: Get energy data automatically (Recommended)

With your authorization, PG&E will electronically sync energy data with your Portfolio Manager account for free. This free data exchange service saves you the trouble of entering your data by hand, and it is the most convenient way for a tenant to share energy use data.

Set up PG&E Portfolio Manager Web Services, using PG&E's [How to Benchmark Your Building](#) and make sure to complete all of the following steps:

- Send a contact connection request to PG&E in Portfolio Manager by inputting “benchmarking@pge.com” in the contacts section (upper right corner). Wait until PG&E accepts and sends a confirmation email (look for a notification in Portfolio Manager, and a separate email, confirming the connection success).
- Send a site/meter share to PG&E in Portfolio Manager. Wait until they accept. You must share both the site and all PG&E meters.

- Complete PG&E [Web Services Data Authorization Form](#) for all meters.
 - Go back into Portfolio Manager; terminate then re-establish your site/meter share with PG&E. This resetting will automatically initiate the data transfer (up to 24 hours).
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Step 3: Generate Performance Reports

An Annual Statement of Energy Performance (SEP) and Emissions Performance report are required every year, to be submitted to the City. To do this,

- Login to [Portfolio Manager](#)
- From “My Portfolio” click on the name of your building under “Properties”
- Click on the “Goals” tab
- Under “Generate & Download Performance Documents for this Property,” click on Statement of Energy Performance (SEP)
- Select “Current Energy Year” from the Timeframe dropdown menu
- Select your Primary Contact and Property Owner. Skip “Verifying Professional” option displayed on the screen
- Select “Generate & Download Report(s)”

Please note: you need 12 full calendar months of consecutive data for each meter associated with your site to generate the reports. PG&E will provide 3 years of back data as long as the customer of record has not changed during that time.

If you are a new owner or tenant, having occupied your building for fewer than 12 full calendar months, you still need to set up a Portfolio Manager account and submit your required form, but will be exempt for the first year of reporting requirements related to the levels of energy and emissions. If you meet this exemption, your forms will read “not available” in most fields.

Step 4: Confirm your data is complete and accurate

- Check your data:
 - Once the SEP Report has been generated, it should be displayed for easy download. If you do not see a report, check that you are not blocking Pop Ups.
 - Portfolio Manager has added a data quality checker (Check for Possible Error tool on the Summary Tab) that will alert you if information is not entered correctly or if your profile is missing data. If there is an error, an

alert will appear. Be sure to use the same time period as your SEP report (Current Year) when inputting the Year Ending: Month and Year before selecting "Run Checker". As an example, for an SEP run in March of 2016, you would select Year Ending February 29, 2016 when running the Data Quality Checker.

- Please review and fix all alerts.
- Check other fields on your SEP, such as square footage and address information, to make sure they are consistent with your records.
- Once all alerts have been fixed and you have verified your data, generate a new, updated SEP on the Goals tab.

Once you have completed Step 3 and Step 4 for the SEP Report, repeat Steps 3 and 4 for the Emissions Performance Report. Under "Generate & Download Performance Documents for this Property," click on Emissions Performance, and follow the remaining steps to complete the process to generate this form.

Step 5: Send data to Oakland CAO Special Activity Permit Division

- Print the SEP and Emissions Performance Reports and attach to your permit application.
- You will receive follow-up from the City of Oakland once we have reviewed your submittal. The City response will indicate whether your report meets the Permit requirements specified in this Exhibit

Links

EPA ENERGY STAR Portfolio Manager

- [ENERGY STAR Portfolio Manager](#)
- [Training from EPA ENERGY STAR](#)

PG&E

- [PG&E Benchmarking homepage](#)
- [How to Benchmark Your Building](#)
- [How to Release Data for Benchmarking Guide](#) (Detailed guide to setting up "Web Services")

- [Web Services Data Authorization Form](#) (Applicable to any PG&E account, including tenants)
- [Free one-on-one Benchmarking Technical Support sponsored by PG&E](#)
- [Free hands-on benchmarking workshops sponsored by PG&E](#)
- [Free on-demand benchmarking training](#)